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Inventory Control User Guide

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What are UNSPSC Codes?

Lawson has incorporated the usage of UNSPSC codes which is a standardized way of categorizing items that people use in commerce. The UNSPSC codes were developed by the United Nations in association with Dun & Bradstreet.

The codes have four levels: segment, family, class, and commodity. These levels create an item hierarchy and allows the user to search for each level for items in the Item Master file.

Example

When the user searches through the segment Office Equipment they would see the following selections.

Segment	Family	Class	Commodity	Description
44				Office Equipment
44	10			Office Machines
44	11			Computer Supplies
44	12			Office Supplies
44	12	15		Mailing Supplies
44	12	16		Writing Instruments
44	12	16	01	Mechanical Pencil
44	12	16	02	Black Stylist Pen
44	12	16	03	Black Pen

What are UPC Codes?

Universal Product Codes (UPC) represent an alternate product identifier for items. They are used primarily in the retail industry. In the Inventory Control application, you can associate a UPC code with an inventory item for tracking purposes. The UPC code includes additional item information, such as UPC type and unit of measure.

You can print UPC codes on labels for easy identification or scan them electronically.

What are UPN Codes?

A Universal Product Number (UPN) code represents the manufacturer's number for an item. UPN codes are used in the retail industry. In the Inventory Control application, you can associate a UPN code with an inventory item for tracking purposes. The UPN code includes the manufacturer's name, manufacturing division, trade name, and unit of measure.

You can print UPN codes on labels for easy identification or scan them electronically.

What are SKU Codes?

A Stock Keeping Unit (SKU) code represents an alternate identifier for items. SKU codes are used primarily in the retail industry. In the Inventory Control application, you can associate a SKU code with an inventory item for tracking purposes. The SKU code includes additional item information, such as alternate unit of measure, shelf label, color, size, and style, and is used in the Order Entry application.

You can print SKU codes on labels for easy identification or scan them electronically.

What are NDC Codes?

A National Drug Code (NDC) represents a specific drug. In the Inventory Control application, you can create an NDC code on the item master and then create a relationship between an item and an NDC number. The NDC number includes the unit of measure and the maker (or distributor).

An item can have multiple NDC codes, similar to UPC and UPN codes.

What are User Fields?

User fields are fields which you define with any information you want. The first line of any user field is searchable when running an item search. If you have information about an item you want, and a field does not exist, you can use User fields to list that information. User fields can contain information that is alpha, numeric, date, or an amount. You define what kinds of information is entered into these fields.

What is a Procurement Group?

NOTE The Purchase Order company must be assigned to a procurement group.

A procurement group is level at which you assign multiple companies for the purpose of sharing vendor and buyer information.

Procurement groups contain available vendors and buyers. Each company is assigned to only one procurement group. When you assign your company to a procurement group, you automatically have access to all vendors and buyers for that group. Companies can also access existing contract information within a procurement group.

Because certain Inventory Control parameters must be set up before you can define a procurement group, the procurement group setup occurs after you set up Inventory Control.

What are Keyword Searches?

Keyword searches allow the user of Lawson Requisitions Self-Service to search the database for items they are requesting by using keywords. A keyword is an index entry that identifies inventory and non-stock items.

Inventory Control dictates which origin fields will be used for searches and, optionally, which synonyms can be used in the searches. Origin fields are the database fields that the keyword field is built from, such as, UPC number or description. Synonyms are words that are similar to the item you are searching for. For example, if you are searching the keyword coat, you may want to define the synonyms jacket, parka, slicker, and windbreaker.

To learn how to perform keyword searches, see the *Lawson Requisitions Self-Service User Guide*.

Procedures in this Chapter

The procedures in this chapter explain the setup you perform in the Inventory Control application. Setup includes tasks such as defining item groups, companies, period end dates, bin usage types, inventory locations, report groups, and inventory classes.

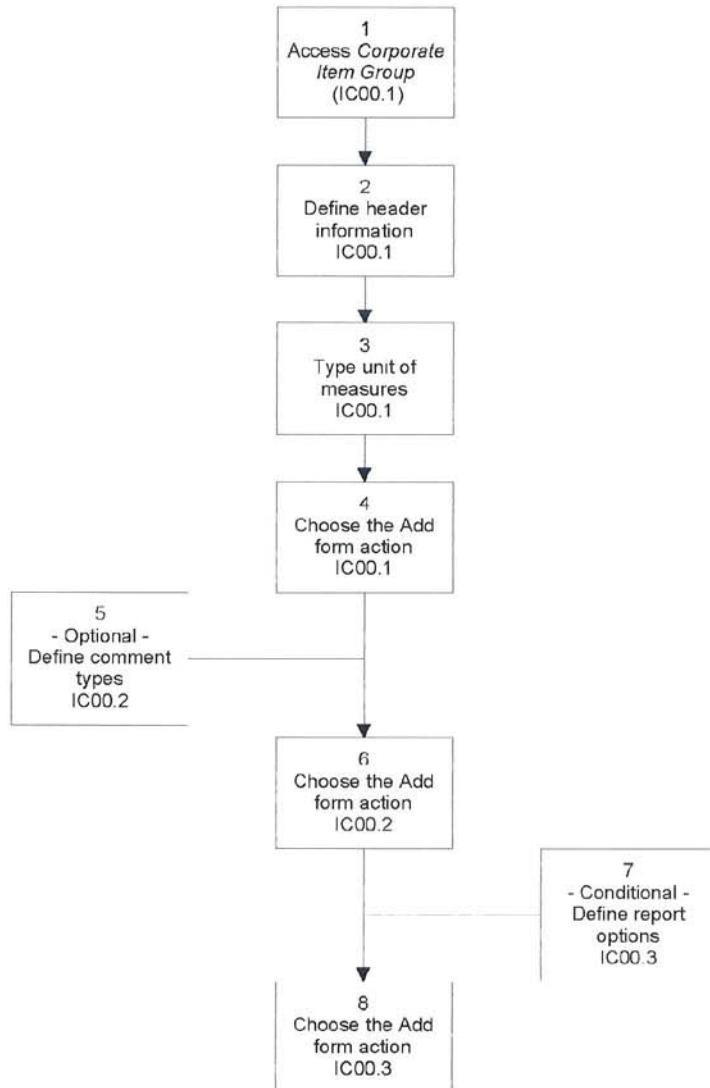
Defining Item Groups

This procedure explains how to define an item group.

 Need More Details? Check out the following concepts:

- "[What do I need to know about Accounts Payable?](#)" on page 24
- "[What is a Unit of Measure?](#)" on page 35
- "[What are Comment Types?](#)" on page 35
- "[Where will my comments display?](#)" on page 35

Figure 3. Procedure flow: Defining item groups



STEPS To define item groups

1. Access Corporate Item Group (IC00.1).

2. Define header information. Consider the following fields.

Automatic Item Numbering Select Yes to automatically number items. Select No to manually enter item numbers. The default is No.

NOTE If you select Yes in this field, you must also select Yes in the Numeric Item Number field.

Numeric Item Number	Select Yes to indicate that item numbers must be numeric (you can change this value after items have been corrected, if you selected Yes). Select No to indicate that items do not have to be numeric.
Vendor Agreement Def Item Create Flag	<p>This field is needed for the creation of new item numbers when you are importing vendor catalogs using Vendor Price Agreement Load (PO536) or manually entering agreements. The values are:</p> <ul style="list-style-type: none"> • Sequential (to create the next sequential item number) • Assign (to assign the item number from another field) • Manual (to manually enter the new item number)

Commodity Structure	Select a commodity structure to assign to the item group. You can assign a commodity structure if you have implemented Strategic Sourcing and have previously defined the commodity structure. For more information, see the <i>Strategic Sourcing User Guide</i> .
----------------------------	--

NOTE You can also load unit of measure information from an external source.

3. Type units of measure.
4. Choose the Add form action.
5. If you want comments to automatically print on documents, define comment types.

NOTE Choose the Add form action for comment types and report options, even if you do not define comment types.

6. Choose the Add form action.
7. If you defined comment types, decide where to print those comment types.
8. Choose the Add form action.

Related Reports and Inquiries

To	Use
List item groups	Item Group Listing (IC200)

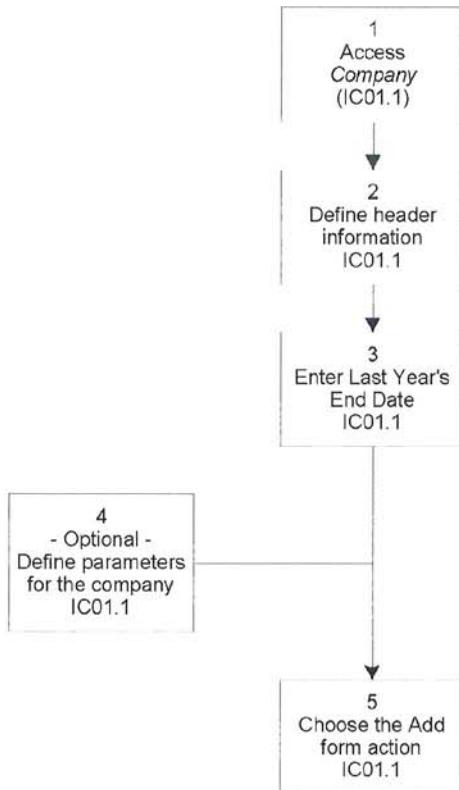
Defining an Inventory Control Company

This procedure explains how to define your Inventory Control company.

 **Need More Details?** Check out the following concepts:

- "[What is an Inventory Control Company?" on page 36](#)
- "[Why are Costing Methods used?" on page 37](#)
- "[How do I calculate inventory available to sell or allocate?" on page 38](#)
- "[What are the Rules for Allocation?" on page 38](#)

Figure 4. Procedure flow: Defining Inventory Control company



STEPS To define an Inventory Control company

1. Access Company (IC01.1).
2. Define header information.
3. Type Last Year End Date.
4. To define additional parameters, consider the following tabs:

Rules

Define rules your company will follow in Inventory Control, such as allocation methods or whether you allow negative stock-on-hand.

Document Numbering	Determine document numbering options, such as automatic or manual assignment of Inventory Control transaction document numbers.
Available	Set up available-to-allocate and available-to-sell calculations.
Work Order	If you use the Production Order application, select the work order numbering method.
Priority Levels	If you allocate items based on priority, type priority numbers for various applications (with 1 being the highest priority).
User Fields	Define fields for Inventory Control, Warehouse, or Production Order applications that are used for your own reporting or inquiry purposes.
Requisition Self Service	Define display options for Lawson Requisitions Self-Service.

5. Choose the Add form action to add your company.

Related Reports and Inquiries

To	Use
List companies	Company Listing (IC201)

Defining Period End Dates

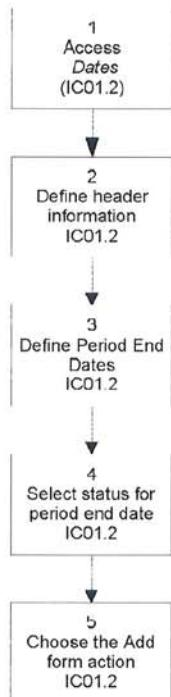
This procedure explains how to establish the dates that the Inventory Control company uses to define the periods for transaction processing.



Need More Details? Check out the following concepts:

- "[What do Inventory Control period end dates determine?](#)" on page 38
- "[What are the options for inventory periods?](#)" on page 39

Figure 5. Procedure flow: Defining period end dates



STEPS To define period end dates

1. Access Period End Dates (IC01.2).
2. Define header information.
3. Type period end dates.
4. Select status of period end date.
5. Choose the Add form action.

Defining Bin Usage Types

This procedure explains how to define bin usage types. For information on defining bins, see "Setting up Bins" on page 65.

 **Need More Details?** Check out the following concepts:

- ["What are Bins?" on page 39](#)

STEPS To define bin usage types

1. Access Bin Usage Types (IC01.3).
2. Select Company.
3. Define bin types. Consider the following fields.

Bin Type	Type a code to represent the bin type.
Allow Receipts	Select Yes to allow this bin type to receive items.
Allow Issues	Select Yes to allow this bin type to issue items.

4. Choose the Add form action.

Defining Warehouse Report Options

If you use the Warehouse or Production Order application, this procedure explains how to indicate which item comments print on picking and packing lists.

 **Need More Details?** Check out the following concepts:

- ["What are Comment Types?" on page 35](#)
- ["Where will my comments display?" on page 35](#)

STEPS To define warehouse report options

1. Access Report Options (IC01.4).
2. Select Company.
3. Select which comment types are to print on the picking or packing lists.
4. Choose the Add form action.

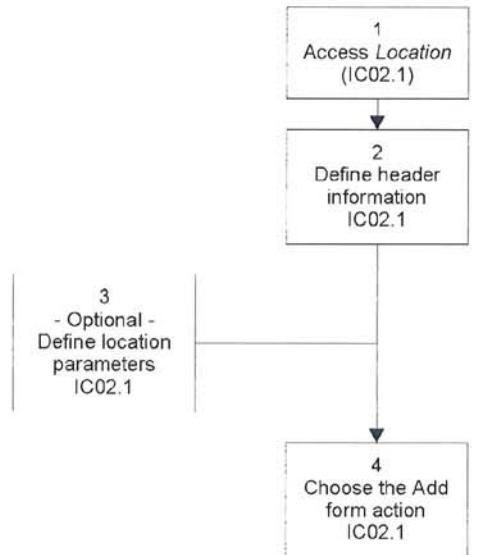
Defining Inventory Locations

This procedure explains how to define inventory locations within your company. Inventory locations hold item balances.

 **Need More Details?** Check out the following concepts:

- "[What is an Inventory Location?](#)" on page 39
- "[What are Customer and Vendor Roles used for?](#)" on page 40

Figure 6. Procedure flow: Defining inventory locations



STEPS To define inventory locations

1. Access Location (IC02.1).
2. Define header information.
3. To define additional parameters, consider the following tabs.

Address	Define address information for the inventory location.
	Choose the Attributes button to define inventory location attributes. For more information, see the Using Attribute Matrix Attributes chapter.
PO Ship To	Define the address to which vendors will ship purchase orders.
PO Bill To	Enter information about the billing address, contact person, and other billing details. Use it for defaulting to the purchase order.

Returns and Inspection	Define default accounts for inventory items that were returned to the vendor or put on inspection hold. The default return accounts are:
	<ul style="list-style-type: none"> • Returns Suspense (for items that were returned to the vendor) • Inspection Hold (for items put on inspection hold) • Freight (for items being returned to the vendor for freight credit) • Handling (for items being returned to the vendor for handling charge credit) • Scrap (for items that failed inspection and the vendor refuses the return; in other words, items that must be scrapped and not placed back into inventory)
Miscellaneous	Define miscellaneous information including:
	<ul style="list-style-type: none"> • Single Document to a PO (indicate how to create purchase orders: such as create one purchase order from one requisition, from one customer order, or from both) • Default PO Dropship (indicate whether to set the Dropship field on a purchase order header when this inventory location is used as the ship-to location on the purchase order) • Requisition options (which shipment processing steps are required) • Roles to process between companies across country lines
	<p>TIP To default the accounting unit for the items at the Inventory Control location while creating a requisition or purchase order, select Yes in the Use GL Category Issue Accounting Unit as Default field.</p>
	<ul style="list-style-type: none"> • Replenishment requester (the requester used for replenishment programs IC141 or IC142)
	<p>NOTE The replenishment requester must have been set up using Requesters (RQ04.1).</p>
Work Order	Define a production facility and related information for the Production Order application.

4. Choose the Add form action.

If you use ProcessFlow, a service is available for notification of an add, change, and delete of inventory locations. For information, see the *ProcessFlow Reference Guide*.

Related Reports and Inquiries

To	Use
List locations	Location Listing (IC202)

Defining Report Groups

If you want additional structures in your company, this procedure explains how to define report groups.

 Need More Details? Check out the following concepts:

- "[What is a Report Group?](#)" on page 40

STEPS To define report groups

1. Access Report Group (IC03.1).
2. Define header information.
3. Select locations to include in report group.
4. Choose the Add form action.

TIP For physical inventory purposes, create a one-to-one relationship between locations and report groups.

Options for defining report groups

The following option is available for defining report groups. You can define a report group subcategory using the Total Group field. If you have multiple locations within a report group, you assign a total group number as a subcategory. For example, if you assigned Locations A, B, C and D to one report group, you can assign Locations A and B to Total Group 1 and Locations C and D to Total Group 2.

Related Reports and Inquiries

To	Use
List report groups	Report Group Listing (IC203)
Print detail usage of an item (at a par location or report group) by period (batch report)	Detail Par Loc Utilization (IC285)
Print detail usage of an item (at a par location or report group) by month (online inquiry)	Detail Par Location Utilization by Month (IC84.1)

Defining General Ledger Categories

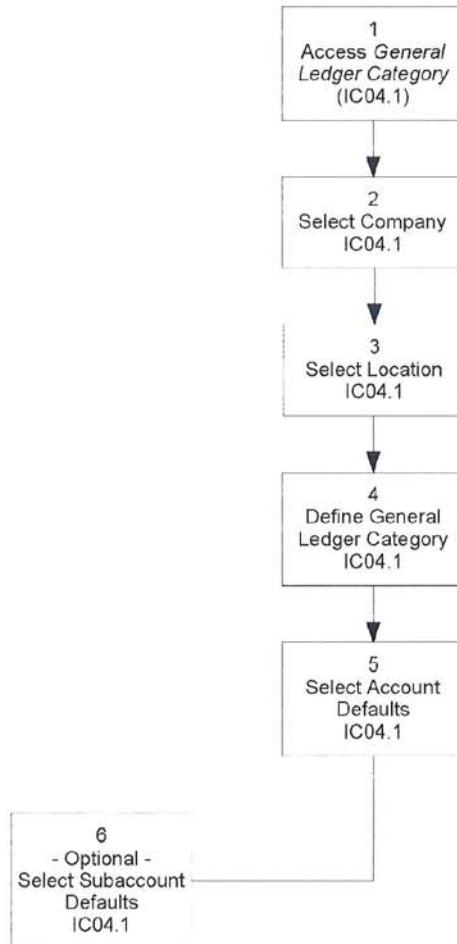
This procedure explains how to define a General Ledger category with defaulting account information.



Need More Details? Check out the following concepts:

- "[What is a General Ledger Category?](#)" on page 41
- "[What is an Accounting Unit?](#)" on page 44

Figure 7. Procedure flow: Defining GL category



STEPS To define a General Ledger category

1. Access General Ledger Category (IC04.1).
2. Select a company.
3. Select a location.

TIP After adding a General Ledger category, assign it to additional locations by changing the location and choosing the Add form action.

4. Define the General Ledger category.
5. Select accounting unit and account defaults. The accounting unit for the Issues field is optional.
6. Choose the Add form action.

Related Reports and Inquiries

To	Use
List General Ledger Categories	General Ledger Category Listing (IC204)

Defining Inventory Classes

If you classify your items, this procedure explains how to define classes.

 **Need More Details?** Check out the following concepts:

- "What are Inventory Classes?" on page 44

STEPS To define inventory classes

1. Access one of the following forms:
 - Sales Class (IC05.1)
 - Inventory Class (IC06.1)
 - Purchasing Class (IC07.1)
 - Freight Class (IC39.1)
2. Define header information.
3. Define Class information.
4. Choose the Add form action.

Related Reports and Inquiries

To	Use
List sales classes	Sales Class Listing (IC205)
List inventory classes	Inventory Class Listing (IC206)
List purchasing classes	Purchase Class Listing (IC207)
List freight classes	Freight Class Listing (IC236)

Defining Inventory Codes

If you use codes to add detail to your items, this procedure explains how to define codes.



Need More Details? Check out the following concepts:

- "What are Inventory Codes?" on page 45

STEPS To define inventory codes

1. Access one of the following forms:
 - Generic Names (IC08.1)
 - Hazard Codes (IC09.1)
 - Manufacturer Code (IC14.1)
 - Reason Codes (IC17.1)
2. Define header information.
3. Type the code or name.
4. Define additional code information. Consider the following fields.

Code	Field	Description
Manufacturer code	Division	Indicates to which area of the manufacturer the item is tied.
Manufacturer code	Labeler ID Code	Indicates the company's Labeler Identification Code.
Reason code	Type	Select None, Waste, or Return to indicate the class used in the Case Carts application.

5. Choose the Add form action.

Related Reports and Inquiries

To	Use
List generic names	Generic Name Listing (IC208)
List hazard codes	Hazard Code Listing (IC209)
List reason codes	Reason Code Listing (IC217)

Loading UNSPSC Codes

If you use UNSPSC codes, this procedure explains how to load the UNSPSC codes using a CSV file. The codes can be attached to the Item Master records to create an item hierarchy. The UNSPSC code must be attached to an item in the Item Master file to be active. This allows you to search on categories in Lawson Requisitions Self-Service.

The CSV file needs to be placed in the following directory. Name the file what you want. The layout is:

UNIX users: **\$LAWDIR/productline/interface directory**

Windows NT users: **%LAWDIR%\productline\interface directory**

System i users: **LAWDIR/productline/interface directory**

Field	Max Size
SEGMENT	2
FAMILY	2
CLASS	2
COMMODITY	2
CODE-SDESC	20
CODE-LDESC	80

 **Need More Details?** Check out the following concepts:

- "What are UNSPSC Codes?" on page 46

STEPS To load UNSPSC codes

1. Access Load UNSPSC Product Codes (IC516).
2. Enter the name of the file to be imported. If left blank, the default file name of ICITEMCODECSV will be used.
3. Enter the item groups that the imported codes should be assigned to. The process can be re-run for additional item groups.
4. Select Yes in the Report Only field to review what will be produced. No records will be updated by selecting Yes. Select No if you want to update without reviewing the report.